

MARNI

INDUSTRY PROJECT

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JAPAN MARKET ANALYSIS

MARKET ANALYSIS JAPAN

Japan's fashion market is mature yet dynamic. Total apparel retail sales are roughly ¥10–11 trillion per year (~\$80–85 billion), with women's clothing (60%) dominating.

LUXURY AND PREMIUM SEGMENTS

Have rebounded strongly from the pandemic thanks to a **weak yen and tourism**, driving imported luxury goods to ~¥4.5 trillion in 2024. Inbound spending by a record **37 million tourists (2024)** boosted the market, though this effect is cooling as the **yen strengthens**.

GEN Z AND MILLENNIALS ARE CENTRAL:

Younger Japanese embrace streetwear, genderless fashion and resale, and show **high digital engagement** (social commerce, influencers). **Physical stores** still rules (80% of purchases), especially in **cosmetics and luxury**, but **online channels are growing rapidly (the fashion e-commerce market)**. Key subcultures range from **Harajuku's avant-garde** to **Tokyo's minimalists** (quiet luxury). Japanese consumers value **craftsmanship, attention to detail and in-store service (omotenashi)**.

OPPORTUNITIES LIE IN OMNICHANNEL

Innovation, **community engagement** (online and offline), **sustainability/resale initiatives** (high consumer interest), and tailored experiences (personalization, loyalty programs). The competitive landscape spans domestic fast fashion (Uniqlo, GU), local luxury and street labels (Comme des Garçons, BAPE, Sacai, Yohji Yamamoto), and global giants (LVMH, Prada) **now competing online**. Brands entering Japan should combine high service, localized digital engagement (**LINE, Rakuten**), and sensitivity to social trends.

MARNI IN JAPAN

THE MARKET

MARKET PROFILE & BRAND POSITIONING

For Marni, **Japan** is a most significant international markets, generating roughly **23% - 25%** of its global revenue.

Consumers here treat the brand as **intellectual luxury**. This makes Japan the leading market for the brand within the **Asia-Pacific** region.

Locally, luxury shoppers overwhelmingly value **in-store experience**

Marni's signature **clash-heavy color** palettes and unconventional photographic campaigns align perfectly with local **fashion subcultures** that favor oversized, art-centric silhouettes.



Figure: Marni FW24 campaign (Tokyo) – Risso's designs often feature oversized, graphic prints and tactile textures. Here, models wear Marni's polka-dot sweater-coats and checked coats, combining contrasting patterns and sculptural shapes. Such clashy color-blocking and inventive silhouettes directly resonate with Tokyo's art-centric street fashion. -

COMPETITORS

COMPETITORS IN JAPAN



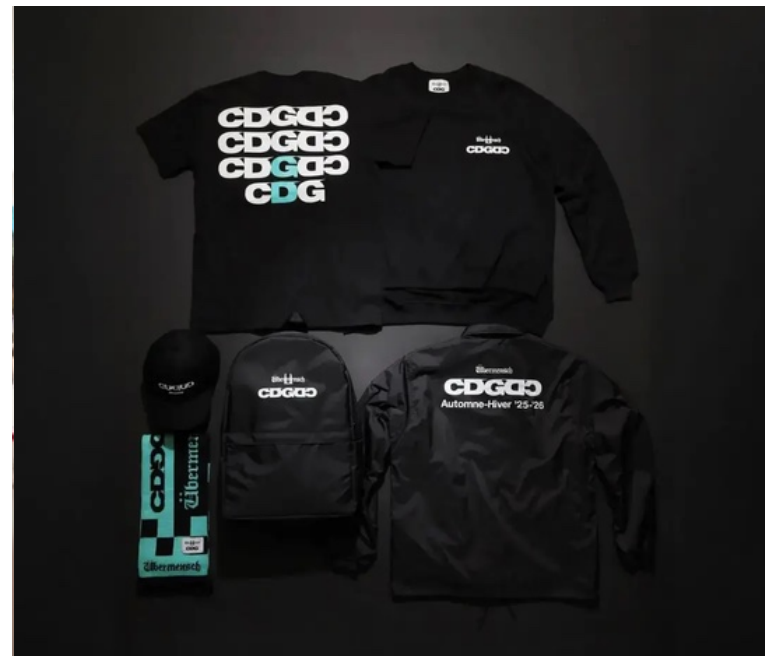
JIL SANDER SS19 CAMPAIGN:

Campaign for the SS19 collection. Showcasing a journey through Japan. Celebrating Japan and how the minimalism of the brand connects with the Japanese culture.



DRIES VAN NOTEN SUMINAGASHI PROJECT SS25:

The suminagashi technique was applied to a selection of garments for the men's SS25 collection. That gave each one a unique hand-drawn motif.



COMMES DES GARCONS CDG X G DRAGON 2025:

Japan limited edition collaboration. Featuring pieces that are tied to his future album "Übermensch". All the pieces included the unique logo of "CDGDC".



ACNE STUDIOS POP UP 2024:

Special holiday pop up featuring denim monogram theme. There were exclusive pink monogram scarves and a sneak peak to the SS24 collection.

COMPETITORS IN JAPAN



JW ANDERSON POP UP 2020:

Pop up under the theme of "British Beach Hat" inspired by a hut in the coast. Showcasing the FW20 collection. Given success they established a permanent store in Shibuya Parco.



MAISON MARGIELA ARTISANAL EXHIBITION 2024 :

Highlighting the "haunting allure" of the Artisanal 2024 collection. Included a horror vignette of the Nighthawk film, which was reimagined to complement the exhibition.



LOEWE X SUNA FUJITA SS24:

Collaboration with pottery studio in Kyoto Suna Fujita. The work is inspired from imagination, childhood memories and their life. Transporting the ceramic characters into artisan crafted pieces.

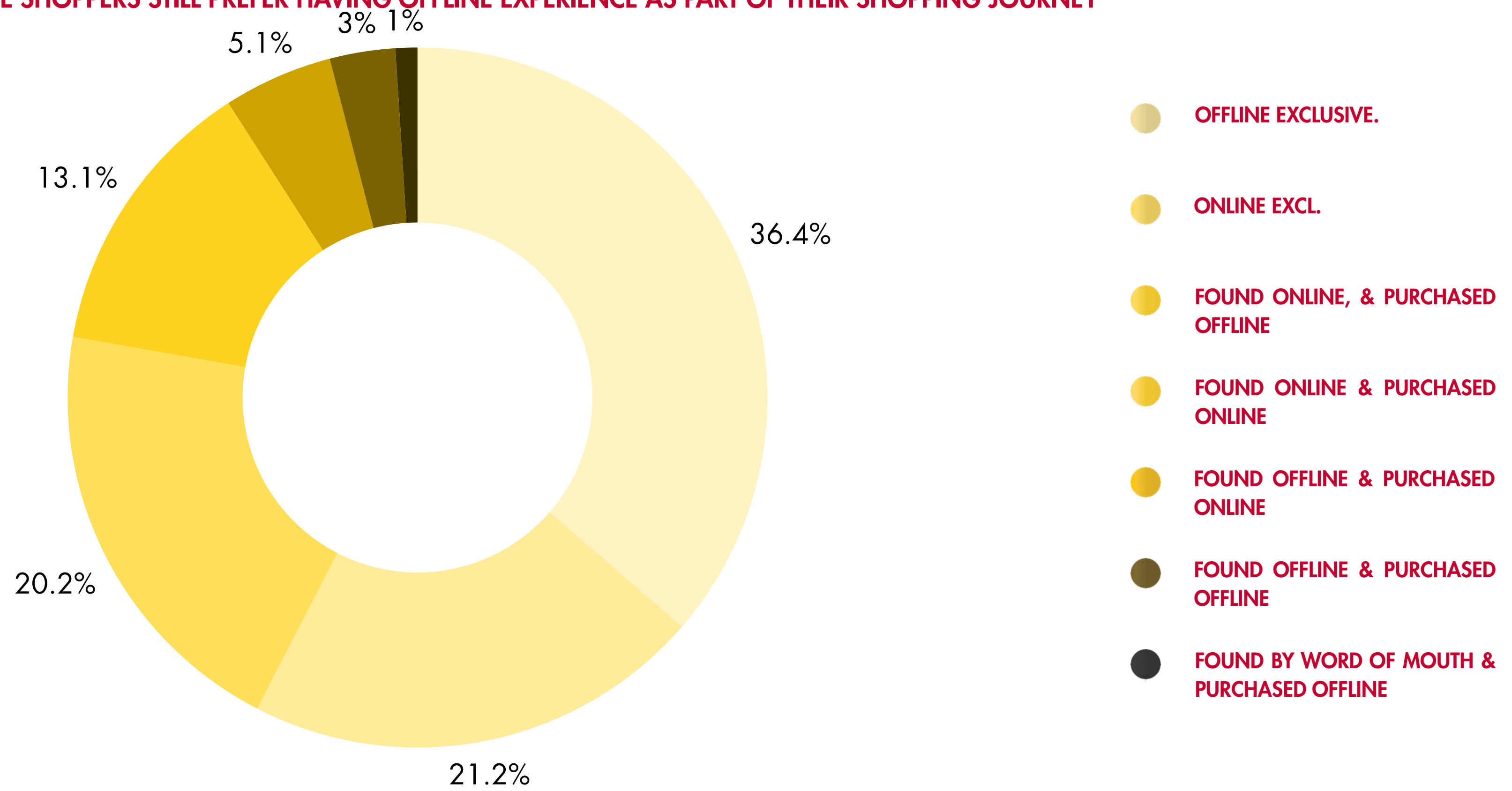


PRADA EXTENDS TOKYO 2022:

A celebration of Japanese culture, music and communities. Each artist's performance is paired with a Japanese visual artis to complete the stage.

CONSUMER ANALYSIS

JAPANESE SHOPPERS STILL PREFER HAVING OFFLINE EXPERIENCE AS PART OF THEIR SHOPPING JOURNEY

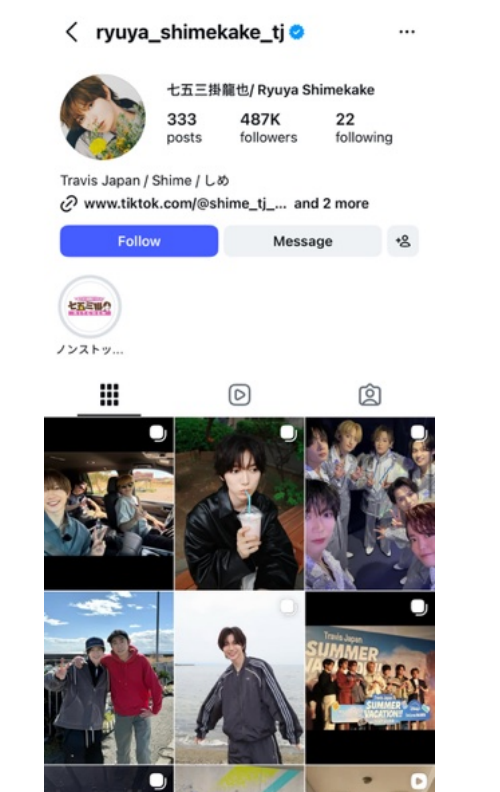
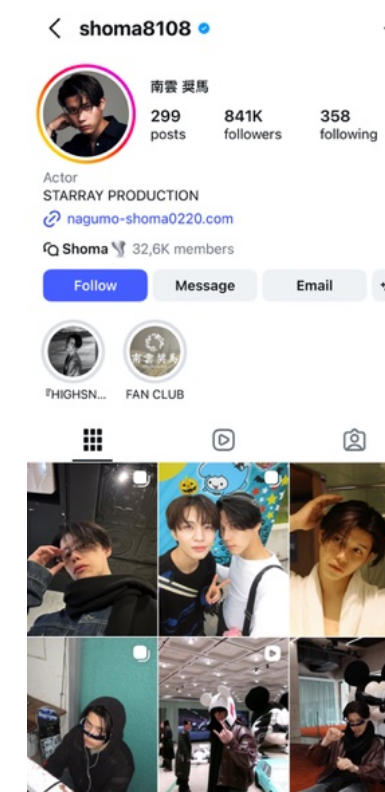
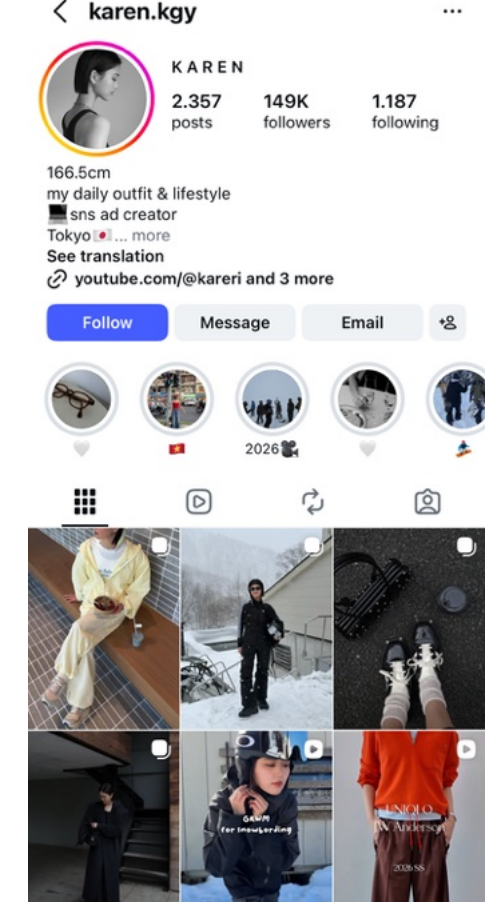
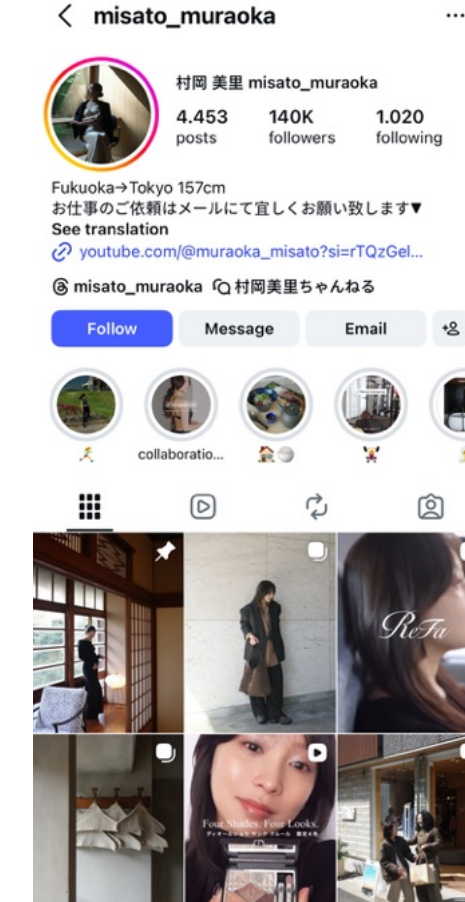
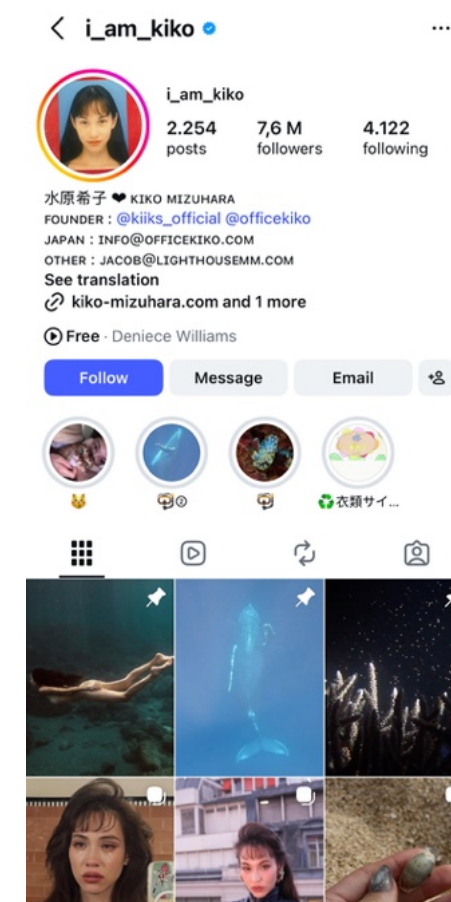


INSTAGRAM FIGURES

Collection of actresses, models, lifestyle content creators, fashion creative that are known in Marni.

Japanese luxury consumers are very influenced by aesthetic environments and lifestyle storytelling rather than direct product promotion.

Instead of going with traditional influencer marketing, Marni has the **opportunity** to **collaborate** with culturally aligned **Japanese people** whose **lifestyles already reflect the brand's emotional and artistic identity**. We have already seen that the Japanese are highly influenced and attracted by authenticity, atmosphere and aesthetic storytelling. Public figures who integrate fashion into everyday experiences like art, cafes, interiors, communities, and travel could strengthen Marni's desirability in a more organic and emotionally credible way. And it creates the **possibility to reach younger luxury customers, helping position Marini within the contemporary Japanese creative culture**, and they'll be able to generate organic visibility without feeling too commercial.



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LUXURY CONSUMERS EXPECTATIONS IN JAPAN

Japanese consumer expects:

- Exceptional hospitality
- Personalised interactions
- Immersive retail
- Emotional service
- Cultural sensitivity
- Tactile experiences
- Thoughtful packaging
- Exclusivity through experience

Omotenashi:

Japanese customers care very much about the “Omotenashi.”

- Mindset of setting hospitality around care rather than expectation
- Making people comfortable, welcome, and making them feel cared for
- It goes beyond the simple phrase “the customer is always right”
- Providing this CARE is what builds the customer's trust, loyalty and gives the brand a long-term value

Marni’s artistic and emotionally driven identity naturally aligns with emerging experiential luxury behaviours in Japan.

STRATEGY PROPOSAL

MARNI COMMUNITY EXPERIENCE

THE VISION

For Marni Japan, the strategy centers on **elevating customer brand experience through cultural immersion, emotional engagement, and community building**. The goal is to reposition **Marni as intellectual luxury** — rooted in creativity and craftsmanship — transforming it from an expressive fashion retailer into an emotionally immersive cultural luxury house.

This is delivered through heritage storytelling, collectible design, intimate community experiences, and immersive environments, all aimed at **strengthening emotional loyalty, elevating luxury perception, and attracting a new generation of culturally driven consumers**.

THE PROPOSITION

At its core, this is a **strategic ecosystem that turns Marni into an immersive cultural world** where heritage, objects, emotion, and community create deeper forms of luxury engagement. Rather than focusing on product consumption alone, the strategy builds emotional belonging through artistic immersion, collectible design, and intimate cultural experiences — bringing a **"World of Marni"** to Japan in environments where retail, culture, and storytelling converge.

MARNI CIRCLE

The anchoring initiative is **Marni Circle**, a **community designed to bring together all Marni customers**. It aims to deepen emotional loyalty and foster long-term belonging by building loyalty, creating exclusivity, and increasing involvement through experiences — making unforgettable memories that reach customers' emotions.

MARNI APARTMENT TOKYO

A temporary immersive residence pop-up inside the emotional world of Marni. This **residence** is designed to combine **fashion, art, design, hospitality, conversation, memory, and lifestyle**. It's been inspired by the Japanese gallery culture, intimate salons, artistic apartments, slow living, emotional luxury and tactile experiences. The guests will have the **experience of discovering a hidden creative residence**. The opening day will include a **presentation by the creative director** to make the experience feel more intimate. We will offer limited-edition **archival books** to enhance the sense of heritage.

Archival re-edition lottery: Inspired by Japanese exclusivity culture, available only through invitation, it will be a lottery system with private access.

Objectives: Quickly establish the presence of the new creative director and attract new customer segments. Achieving emotional intimacy and creative legitimacy.



AI was used for the visuals

1 THE ARRIVAL

Transition into Marni world, sculptural seating, curated silence, soft ambient sound, textured walls, suspended fabrics (emotional decompression).



2 THE WARDROBE

Fashion space, products as emotional pieces, limited archival re-edition, curated wardrobe selections, iconic garments throughout the years, sculptural accessories



3 THE SALON

The living communal room. Warm, layered, intimate, (japanese tea salons) conversation area



4 THE KITCHEN

Cafe Marni pop-up providing teas, pastries, seasonal ingredients (inspired by Japanese culture)



5 THE LIBRARY

Archive space, archival books, sketches, runway photography, films, material research, creative director references, cultural inspirations, handwritten notes



6 THE ROOM

Risso emotional chaos, massive sculptural forms, oversized textures, moving sounds, unexpected tactile surfaces



7 THE STUDIO

Meryll Rogge vision, works in progress, sketches, future materials, experimentation, process, upcoming concepts



FILM SERIES

Creating a series of **short videos** to be shared through their social media accounts. The content will include the behind-the-scenes of **what it is to be the Creative Director of Marni**, visits to her studio, fabric selection processes, and demonstrations of complex craftsmanship.

Objectives: To quickly establish the presence of the new creative director and attract new customer segments. Achieving emotional intimacy and creative legitimacy.



EP.1
A day in the studio



EP.2
Choosing right textures



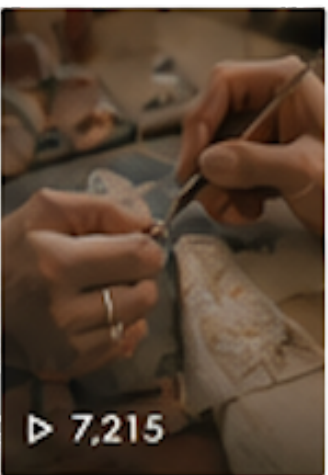
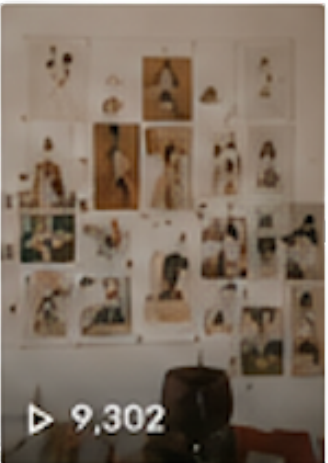
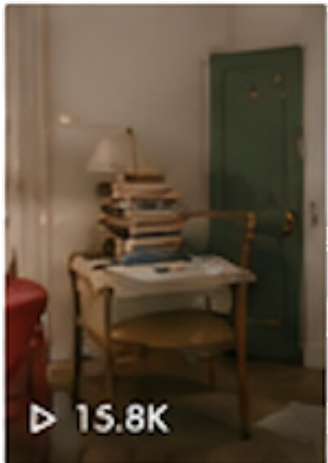
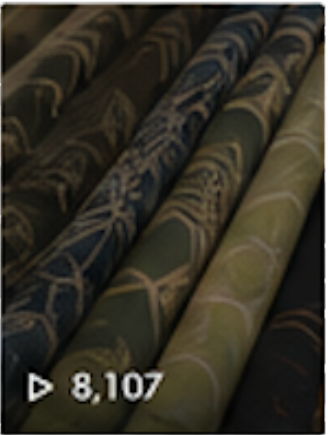
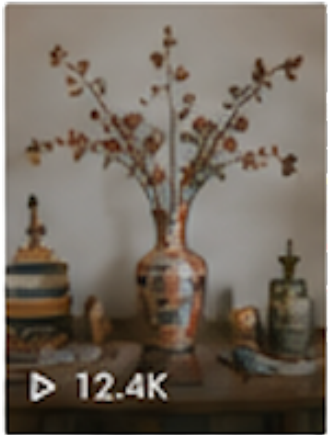
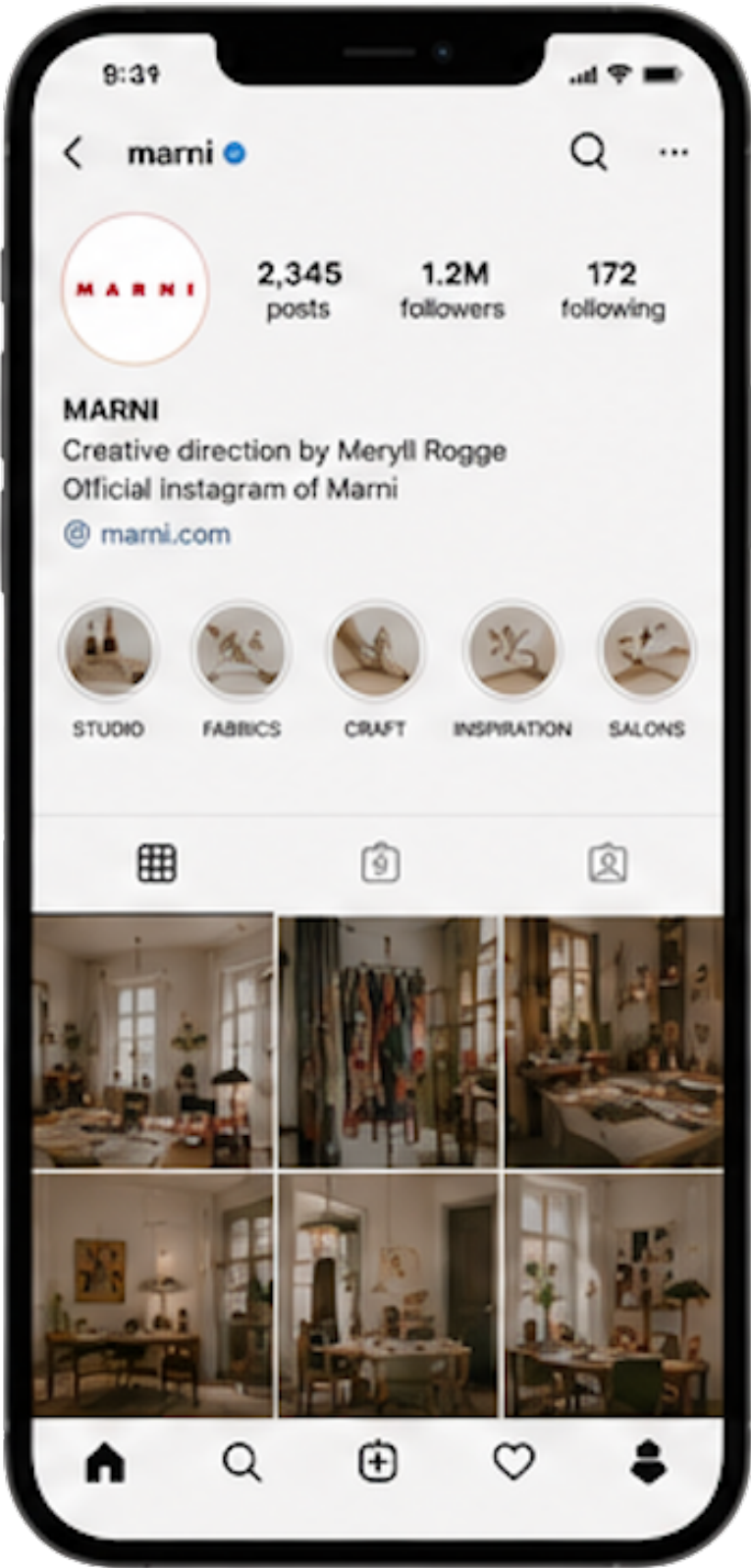
EP.3
Art of pattern making



EP.4
Ideas come to life



EP.5
Crafting with intention



AI was used for the visuals

https://www.riseart.com/artist/41926/mizue_yoshimura AI was used for the visuals

MARNI SALONS

Including temporary emotional installations integrated into the store. These spaces will evolve seasonally and will invite customers into a **creative, intimate, artistic, and emotional space**, where craftsmanship and conversation are dominant. Customers enter the **creative process** of the brand and do not just watch.

1: **OBJECT SALON:** A place where clients will be able to choose lining, select interior leather colours, choose the hand-finished edges, add discreet embossing, select stitching details.... A process of refined customisation.

2: **WARDROBE SALON:** A private styling session exploring the emotional wardrobe of Marni. discovering silhouettes, experiment emotionally, build personal wardrobe narrative. (sculptural mirrors, soft lighting)

Objectives: achieve unforgettable memories, reaching the customers' emotions. Increase brand loyalty. Provide a more experiential retail.



OBJECT SALON

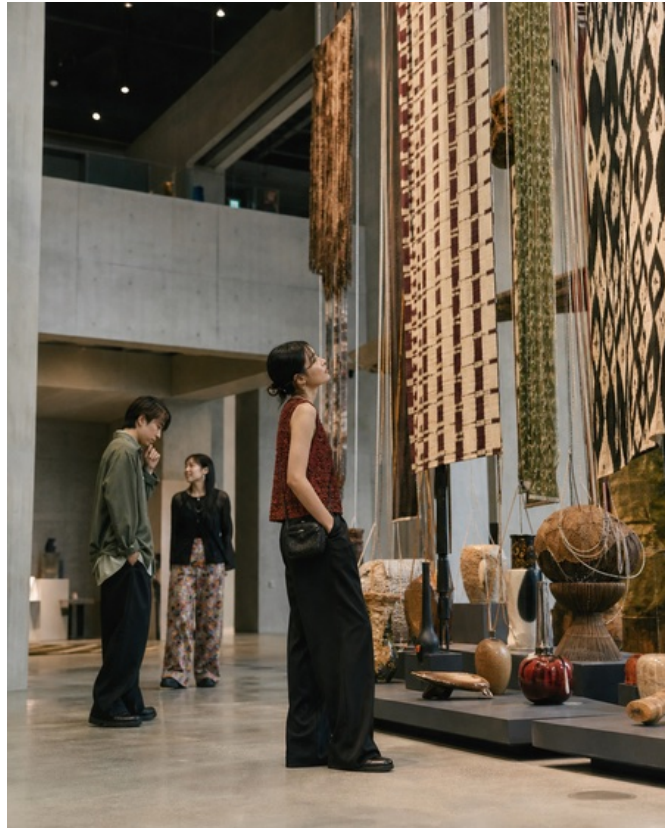


WARDROBE SALON

CUSTOMER JOURNEY

1. DISCOVERY

- Exhibitions
- Social media content
- Digital campaign



2. ENTRY

- Store visit
- Pop ups
- Interactive installations



3. ENGAGEMENT

- Workshops
- Styling sessions
- Customisation



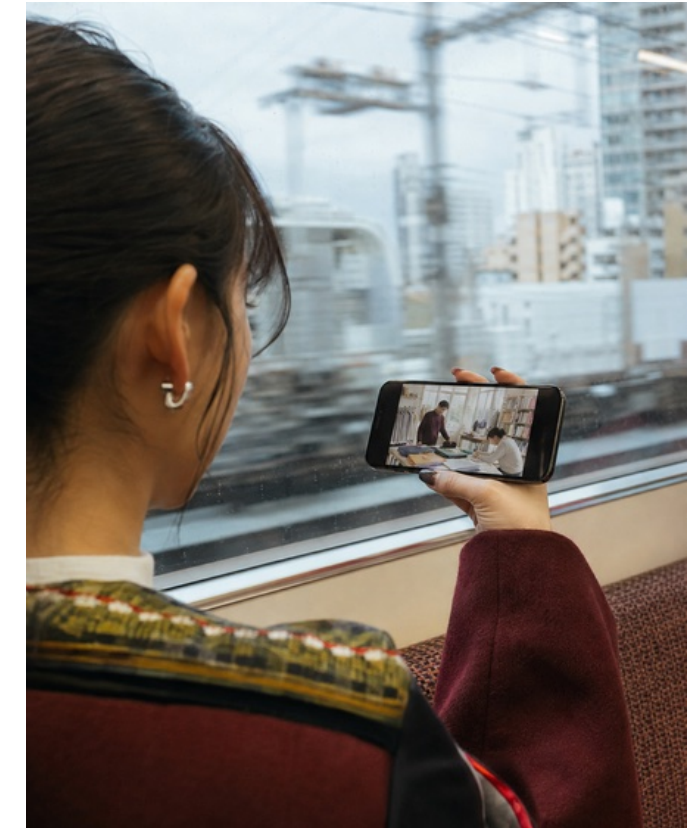
4. LOYALTY

- MarniCircle
- Private events
- Early access



5. SUPPORT

- Social sharing
- UGC
- Word of mouth



With the Marni Community Experience we create a continuous ecosystem where cultural attivazione attracca audience, immersive retail experiences engagement time, and community iniziative transform them into loyal brand advocates

TIMELINE

PHASE 1

BUILDING

July-August

- Setting the foundations
- Introduction to the community with store transformation

PHASE 2

ENGAGING

September-October

- Implementing the experiences
- Cultural relevance

PHASE 3

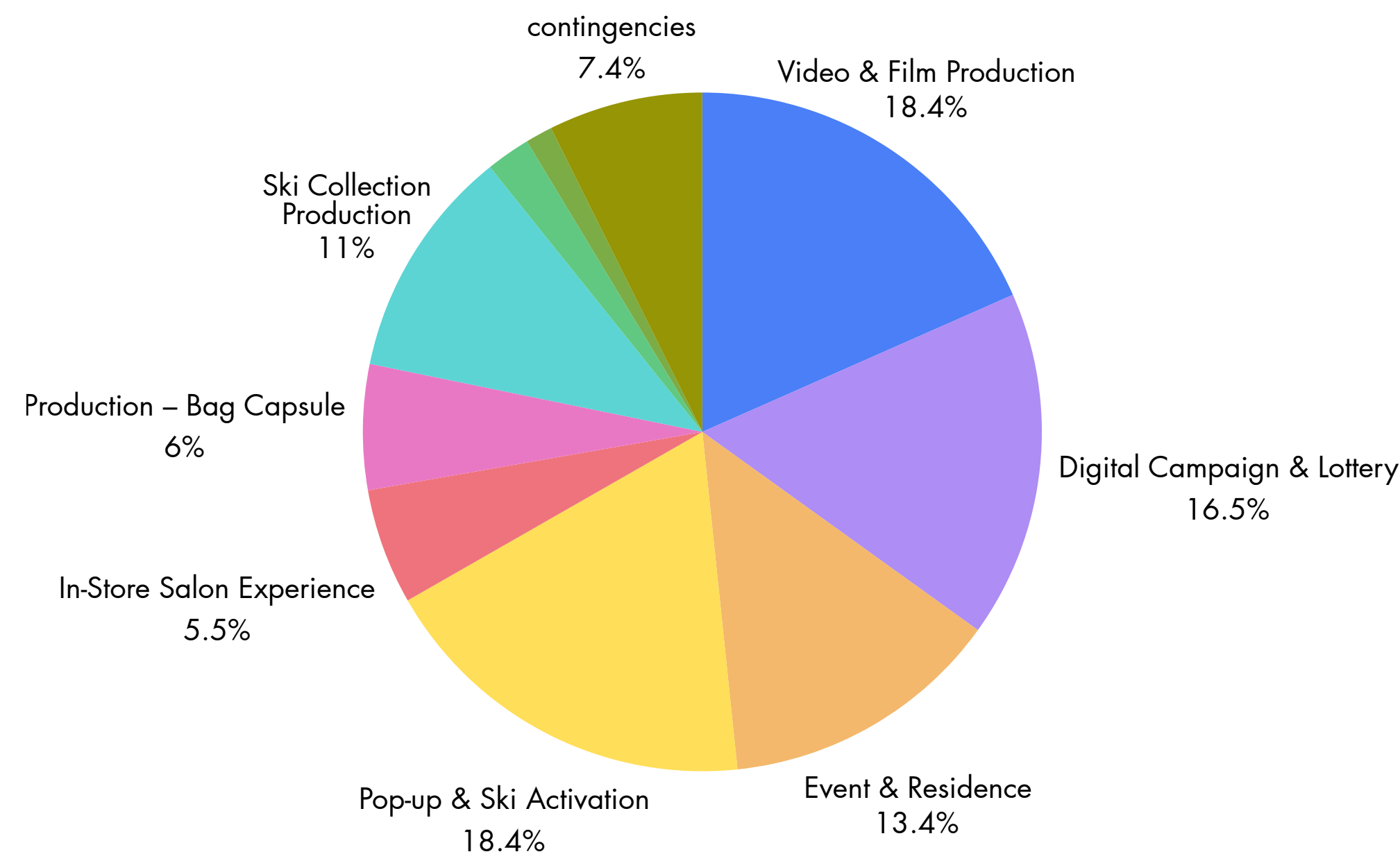
AMPLIFICATION

November-December

- Reaching high impact visibility
- Exclusivity
- Loyalty Peak

With the Marni Community Experience we create a continuous ecosystem where cultural attivazione attracca audience, immersive retail experiences engagement time, and community iniziative transform them into loyal brand advocates

PIE CHART OF INVESTMENTS



Category	Amount (€)	Percentage
Marketing Expenses		
Video & Film Production	100,000	19.80%
Digital Campaign & Lottery	90,000	17.90%
Event & Residence	73,000	14.50%
In-Store Salon Experience	30,000	6%
Production Costs		
Archive Re-edition	11,500	2.30%
Archive Book and Salons Samples	7,000	1.40%
Contingencies	40,000	7.40%
TOTAL	544,000	

KPI OVERALL SUCCESS RATE

If the strategy is released now and performs well, success would look like moderate to strong lifts across all seven areas, with the strongest results in brand image, engagement, and loyalty, followed by traffic, advocacy, sales, and ROI. In simple terms, the strategy succeeds when Marni is not only bought more, but felt more, remembered more, and talked about more.

